U.S. DEPARTMENT OF COMMERCE

MBDA

MINORITY BUSINESS DEVELOPMENT AGENCY

RESOURCE LOCATOR HANDBOOK/GUIDELINES

Prepared by

Office of Information Technology, Research and Innovation

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I. Introduction

The Resource Locator (RL) is a unique software application, which allows the public to search for business resources and locate them inactively on the Internet. This database was developed to provide referral information and assistance to minority business clients and Internet users. The RL uses a link from the Minority Business Development Agency (MBDA) website www.mbda.gov to search for institutions throughout the country that provide business development services. Raw data is put into the database through an input form. These institutions are identified, submitted and updated by MBDA field personnel.

A. Using These Guidelines

1. Describes how to access our Web pages; how to access the MBDA Portal; and how to provide feedback.

The MBDA Portal is available to all users and will not require any registration to access the information. When you log in, you are greeted and if you are an existing **MBDA Employee**, **Regional Staff Member**, **BDC Member**, **Strategic Partner** or **Grantee,** you will be asked to use your existing login and password to access the Portal.

Once you have logged in, you will be able to update your contact information. You will be assigned a login ID (in some cases this ID may be the similar to or the same as your existing ID). You will also be required to enter a password. Be sure to note your ID and password, as you will need them to use the many features of the Portal.

The Resource Locator is located under **"Tools and Services".** Click on the bucket entitled, "**Capital and Resource Locator**;" then click on **Resource Locator**.

To provide feedback on any aspect of the Resource Locator, click on **Search for Resource**. New resources are being added and resources are updated weekly. We are looking for your ongoing feedback to improve the tool's usefulness for MBDA staff and our customers.

2. What is a Resource?

The focus should be on public sector (Federal, State & Local units of government), publicly funded and non-profit institutions (including Business and Trade Associations) for input. Include all Commerce Department resources within your regional territory. ***A "Resource" represents a public institution or organization that provides services, assistance or information that would assist in starting or expanding a business enterprise.*** It must be "Geographically identifiable" on a map with a valid street address, city, state and zip code.

A Resource cannot be a for-profit organization or a commercial bank. These resources are available for your use in referring customers to locate assistance in their area.

3. What to expect from quality assurance; when you search for a resource.

As a reviewer or one who does the quality assurance, you must be cognizant of the mandatory fields as well as the kind of resources that are being entered. Make sure to look for duplications that the system may not pick up on because of misspellings.

In all cases, only institutions that can provide useful services to the business customers are to be entered. Quality Assurance will also allow you to view all of the approved, disapproved or pending resources within your jurisdiction. The Quality Assurance Team Leader can review all resources in the database: approved, disapproved, and pending; and is the very last to review resources before they go live in the database.

4. Reports and how they can be used.

A total view of all resources in the database can be comprised into lists, tables, reports, etc., and displayed by owner, by state, and by region.

B. What's New

1. The new faces since FY 1998.

The **Resource Locator** was developed to provide referral information and assistance to minority business clients and Internet users. MBDA's vision was to have thousands upon thousands of resources in the database by now; however, one of our biggest problems has been finding resources, and making sure all of the data was accurate. The Locator has advanced to a more user-friendly version and hopefully, with more personnel entering data, we will continue to get feedback to update/modify even more.

2. Who will populate the database in the future?

Population of the database will become the responsibility of the field staff and funded organizations; quality assurance then becomes an activity at the field level. This will be accomplished through a permissions system.

3. Who to ask for help.

Funded organizations should seek assistance from the NEC staff (Regional Coordinators); Regional Coordinators and the business community should seek assistance from the QA Team Leader. Any and all comments can be sent by email to gbis@mbda.gov.

II. Who Enters Data

A listing of all field personnel, by region, with permission to access the RL database is kept on record at MBDA Headquarters. Permission is given by the National Enterprise Center (NEC) Director. It is also the NEC Director's call to name the Regional Coordinator for his/her area.

III. Roles and Responsibilities

Maintaining the RL is a shared responsibility performed by various MBDA offices. These include the Office of Information Technology, Research and Innovation (OITRI), the Office of Business Development (OBD), the NECs, and funded organizations.

It is the responsibility of the Regional Coordinators and the Quality Assurance (QA) Team Leader, that population of the RL contains accurate and complete data input.

A. **Regional Coordinators (RC)** - represent the NECs and serves as liaison with MBDA Headquarters, funded projects and the general public in overseeing the successful operation and implementation of the provided product. The RC keeps field staff informed on the use and quality control procedures for inputting new records and editing existing records.

Atlanta	**Letitia Woods**	lwoods@mbda.gov	**404/730-3300**
Chicago	**Alvoyd Whitaker**	awhitaker@mbda.gov	**312/353-0189**
Dallas	**Raquel Suniga**	rsuniga@mbda.gov	**214/767-8006**
New York	**Ronald Uba**	ruba@mbda.gov	**212/264-3262**
San Francisco	**Terrenz Phan**	tphan@mbda.gov	**415/744-3001**

The RC is responsible for:

- Ensuring that the RL database is populated with data that meets quality assurance standards of validity, accuracy, and completeness.
- Ensuring a smooth communication link between the NEC Director and the RC; the RC, regional staff and the Centers; and the RC and the QA Team Leader.
- Providing guidance, direction and resolving problems at the regional level before they reach Headquarters.

It is the RC's responsibility to inform the QA Team Leader, in writing, of any problems that may require assistance from the OITRI.

RCs are responsible for oversight and monitoring of designated funded organizations' compliance with regulations and procedures. Each funded organization has a RC who is expected to review the resource entries to ascertain that the quality and quantity of resources are being entered correctly and to ensure the validity of the resources.

B. It is the **NEC Director's** role to give permission to enter data into the RL database to the regional staff as well as staff of the funded organizations. Each funded organization has been given a quota of resources to enter. It is the NEC's duty to monitor this process, and results accountable to the Office of Business Development (OBD).

Funded organizations are required to adhere to the requirements of the ***Federal Register***, the NEC, and MBDA Headquarters' specific rules and regulations, and they are expected to exercise good business judgment.

C. **The Quality Assurance Team Leader** - Serves as the principal entity available to provide support services on the RL to the field, as well as answer any questions and verify that the RL contain quality information. She can be reached at:

Team Leader	**Frances Douglas**	fdouglas@mbda.gov	**202/482-3817**

Any general questions or concerns must be directed to the QA Team Leader. Problems or issues of a technical nature should also be directed to the QA Team Leader at Headquarters, who will direct your problems or concerns to the proper personnel.

The QA Team Leader is responsible for:

- Ensuring that a two-way communication link exists between Headquarters and the field staff to provide direction and resolve problems.
- Ensuring that the RL database contains data that meets quality standards.
- Conducting quality assurance reviews on resources in the RL database for validity, accuracy, and completeness.
- Coordinating and conducting reviews to improve overall efficiency and effectiveness in regional productivity and performance.
- Overseeing the quality and accuracy of regional staff's data input and editing.
- Maintaining a file or logging system to account for regional office activity and follow-up.
- Ensuring that written error reports are transmitted periodically to each region for corrections.
- Revising and updating the online User Manual and/or Resource Locator Handbook/Guidelines.
- Revising and updating the one-page document used to describe the Resource Locator database.
- Providing online or telephonic training for field office liaison staff, when necessary.

IV. Restrictions

The preparation of RL data entry is very important to the process. Through it, resources are reported correctly or incorrectly. Two key aspects of the preparation are proper documentation and the *certification* for completeness and accuracy. The procedures for each of these aspects are described below:

1. Do not make direct contact with the Information Technology Staff at MBDA Headquarters (contractors); contact the QA Team Leader instead.
2. The RC should maintain some type of catalog of resources entered on at least a weekly basis.

3. The deletion of resources can only be accomplished at the Headquarters level. A list of all resources for deletion should be sent, in writing, to the QA Team leader. A reason why these resources are to be deleted should also accompany this list.

4. Any resources that have not been updated in a three-month period will automatically be deleted from the database.

V. Procedure

All funded organizations, until further notice, must complete the **Resource Locator Input Sheet** for any new resources to be entered into the database. The Sheet must be completed in its entirety and sent to the RC for that particular NEC.

For input from any other source at Headquarters, the **Resource Locator Input Sheet** must be completed and forwarded to the QA Team Leader for processing. Upon receipt of the Sheet, the QA Team Leader will enter data into the database. Regional staff is responsible for forwarding resources for other NECs to their own counterparts. Sharing new resources found in other regions, not your own, is an excellent way of further populating the RL.

You enter the RL database through the MBDA Portal; under **"Tools & Services"**, click **Capital and Resource Locator**; click **"Resource Locator"**. Across the top of the screen will be a display with these titles:

Home
Inbox
Input Resource
Quality Assurance
Search for Resource
FAQ
Reports
Guidelines/Handbook

1. The ***Inbox*** is the first screen that will appear for each individual that input data. If you have never entered data or have not entered data recently, then your Inbox will probably be empty. However, if you have resources in your Inbox, and they have been through the QA process, then there are a number of activity items shown:

   - To the far right of the resource, you will see the status, i.e., new, modified, etc.
   - Just below the resource, you will find comments, made by the QA Team Leader. These comments will indicate what corrections need to be made.
   - You will also see who the owner of the resource is; who updated the resource; and the date it was updated.

   Another reason your Inbox might be empty after the QA process is that all of the resources entered, were approved or deleted.

2. To ***enter a new resource***, click on “Input Resource”, and a blank input sheet will appear on your screen. Once the sheet is complete, the data is held for quality assurance. Presently, all quality assurance is performed by the QA Team Leader.

3. To ***edit a resource***, click on the name of the resource; a screen will appear with all of the data previously entered, along with an edit indicator to the right. Click on the word “edit”, make the correction, and submit.

4. To ***search for a resource*** or view all resources in your region, click on “Search for Resource”; a screen will appear and ask you to select a state, or if you prefer, “all states”, click next and it will ask you to select a city; click next and then you select “type of service”. After clicking on “next”, the total number of resources matched will appear with the total number of resources at the top left side of the page.

5. If you choose to search for existing data; or in the QA Team Leader’s case, do some quality assurance.

   It is important that the information on the Sheet and what you entered are accurate and consistent. The reviewer should cross check each field (particularly the mandatory fields) to ensure that the Sheet with the forwarded data and what shows on the screen has the same information:

   - Resource Provider Name (spelled correctly)
   - Address (no abbreviations)
   - City
   - State
   - Zip Code
   - Telephone Number (including area code)
   - Email Address
   - Resource Type
   - Type of Service
   - Description of Services

   All approved entries are processed and become live in the database overnight.

VI. Reporting

A report mechanism is installed in the database to record all resources. Four reports are listed:

Resources by Owner and Region
Number of live resources entered on all dates, subtotaled by owner and by region of owner.

Resources by State and Region
Number of live resources entered on all dates, subtotaled by state and by region of resource.

Disapproved Resources by Region and Owner
Details for disapproved resources awaiting correction, grouped by owner and region of owner.

Resource Summary by Owner per Year
Summary of new, new disapproved, and previously entered but newly modified and disapproved records for each owner during a specified fiscal or calendar year.

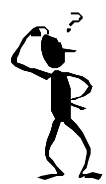
The QA Team Leader will develop reports to monitor errors and the quality of new entries. The QA Team Leader will also conduct periodic evaluations and assessments of current status of program operations and provide recommendations to improve the management of the RL database system.

VII. Basic Security Management:

- Permission made in writing by the NEC Director
- Designation of Regional Coordinators
- Only QA Team Leader's ability to delete resources

The RCs should be informed when a funded organizations' representative has been replaced by another to input data; and the RC should inform the QA Team Leader of those changes as well.

VIII. Frequently Asked Questions



Each region has a strategic plan that was negotiated with Senior Management for several different performance indicators. Reports are provided on regional progress in submitting resources into the Resource Locator but goals are not set.

- **Does the field get "credit" for resources that have to be deleted?**
  - That depends on why the resource was deleted. If the resource was deleted because the organization is no longer in business or the organization no longer provide the kind of services to minorities that it once did; then yes, the field does retain credit for the resource. However, if the resource is initially deleted because it was not a valid resource in the first place, then no credit is given to the field.

- **Does the field get "credit" for editing data already in the database?**
  - Yes. Originally, the database was populated by Headquarters staff.

    While some of the input is still valid, there is some that require infrequent updates and the original owner is no longer present. Therefore, any resources updated by field staff, will be credited to the new owner.

- **Does one get "credit" for resources identified in one region but passed on to another region? (Keep in mind, that one region can not input data into a region not his/her own.)**
  - Unofficially, yes. That credit will not show up in any reports, however, by a gentlemen and ladies code, there should be a mutual understanding of this credit; as with a hand-shake.

- **How soon after entry does it take for a resource to become live in the database?**
  - After becoming familiar with the database and entering a few records, it should take 2 to 3 minutes or less to enter each resource. The Quality Assurance Team Leader, at Headquarters will review the entries and provide feedback to ensure a high quality product. Once the resources go through the quality assurance process, it only takes overnight for the resources to become live in the database.

IX.	Dos and Don’ts
DO	Populate the database with new resources as often as possible.
DO	Provide a brief statement in sentence or phrase format that, in plain English, gives information about the specific business development services provided by the organization.
DON’T	In many cases, the "Description of Services" field does not provide any information about the business services that are provided. Examples are: ▪ "minority affairs" ▪ "business development" ▪ "Chamber of Commerce" ▪ "NAACP" ▪ "community college" In other cases, the "Description of Services" field had a long narrative but did not provide any useful information about a business service. Please avoid this.
DO	Use spell-check, and double check grammar and punctuation when inputting data. Numerous records also have incorrect sentence structure.
DON’T	Do not use abbreviations and/or acronyms when entering a resource name or a street address. Some abbreviations and/or acronyms are always understood by most users.
DO	Use the Zip Code Directory as a reference when verifying addresses (particularly colleges and universities).
DON’T	Do not identify a college or university as a resource, when no specific business service other than a degree is identified.
DON’T	Do not request that a record be deleted without a legitimate reason why.
DO	Avoid duplicating records. Resources could have the same name, but not the same address.
DON’T	Do not use addresses that list a "Hall, Highway, Mall, Plaza or Track, etc". This is usually a sure sign that these addresses will not geocode for mapping in the future.
DO	Make corrections on error reports in a timely manner; unless you have to do major research, corrections should be made and reported back within the same week. Depending on the number of records (more than five, but less than ten) there is a two-day turn-around time.
DO	Adhere to all due dates set by your Quality Assurance Team Leader.
DO	Keep close and regular contact with your records input staff, National Enterprise Center Director, and your Quality Assurance Team Leader. Communication is important and we should all be on the same timetable.
DO	Ask questions, no matter how insignificant.

X. Resource Entry Instructions

How to complete the blank **Resource Locator Input Street**:

Detailed instructions for each data entry field can be found under the Resource Locator tool, by clicking on FAQ. Please note that mandatory fields are indicated in RED. There is also a blank Input Sheet below, for your information and use.

XI. BLANK RESOURCE LOCATOR INPUT SHEET

Do not use abbreviations – All fields in "RED" are mandatory

Field Title	Input Data
Resource Provider Name	(Full Name of Resource)
Secondary Name	If a secondary name is not available or appropriate please leave blank.
Address	(Street number and name [*example: 123 Main Street*]. Resource must have a site, i.e. Street, Avenue, Boulevard, Lane, etc.)
	Include relevant information descriptors as stated. Room number, suite number, floor number, etc. *P.O. Box should be noted in this field*.
City	(City Name, not County)
State	Use two-characters to indicate state (example: Georgia – GA, or Arizona – AZ)
Zip Code	Insert the five -digit zip code. If you have the nine-digit, include that as well.
Resource Web Site	Do not enter http:// (that part is already in the system; start with, i.e, "www")
Resource Contact Name	Provide the name of a contact person at the organization or institution. (Must have a real person to contact, not a machine).
Contact Title	Job Title/Position of the Contact Person
Phone Number	(Include area code)
FAX Number	(Include area code)
E-mail Address	(Organization should be computer literate for access via the internet.)
Resource Type	Classification of Resource *(i.e. Federal, State or Local Government, Non-Profit, etc.) Choose one.*
Types of Services	(At least one must be offered)
Description	Provide a brief but grammatically correct statement in sentence format describing the types of resources and/or services offered by this institution.
Organizational Affiliations	Identify affiliation or relationship through funding, sponsorship or association with a Federal, state or local department that this Resource has with other organizations.

The End